

Amendments To Claims:

This listing of claims will replace all prior versions, and listings, of claims in the application:

Listing of Claims:

1 (currently amended) A method for generating account statements for batch printing, comprising:

grouping a plurality of accounts for which account statements are to be generated in a batch printing run;

receiving account data for each of the plurality of accounts, the account data for use in generating at least one account statement for each of the plurality of accounts;

presenting, to a user, a plurality of reporting formats that are available to be assigned to at least one of the plurality of account statements, each of the plurality of reporting formats defining a printed layout of the account data for the account statements;

receiving, from the user, a selection of a first account from the plurality of accounts, and a selection of a first reporting format from the plurality of reporting formats for the first account;

receiving, from the user, a selection of a second account from the plurality of accounts, and a selection of a second reporting format from the plurality of reporting formats for the second account;

receiving, from a user, a designation for corporate review corresponding to at least one of: the first account and the second account, wherein said designation for corporate review is stored with statement parameters;

retrieving the statement parameters applicable to the account statements, wherein the statement parameters include a recipient list, statement description, statement type, statement status, a number of copies to be generated, a the designation for corporate review, and a designation for internal copies; ~~and~~,

assembling a directory of individual account statements, wherein said directory of individual account statements includes the designation for corporate review;

displaying the directory of individual account statements assembled for the batch printing run;

preventing the batch printing run until all individual account statements within the batch printing run are approved and released;

receiving, from a reviewer, a selection of an account statement from the directory for review;
presenting the selected account statement to the reviewer;
receiving, from the reviewer, at least one of: an approval of the selected account statement, a rejection of the selected account statement, a correction of the selected account statement, a request for regeneration of the selected account statement, and a request to delete the selected account statement;
releasing the selected account statement for the batch printing run; and,
generating, in accordance with the statement parameters, a first account statement in the first reporting format for the first account and a second account statement in the second reporting format for the second account, said first and second account statements for printing in the batch printing run.

2. (original) The method of claim 1, said grouping further comprising:
grouping the plurality of accounts based on a group designation selected by the user.
3. (previously presented) The method of claim 2, said first and second account statements comprising at least one of a billing statement, a credit card statement, and a summary of investment holdings.
4. (previously presented) The method of claim 3, said account data retrieved from a financial database.
5. (original) The method of claim 4, further comprising:
receiving, from the user, a correction of the account data for the first account, wherein the correction is entered into the financial database.
6. (previously presented) The method of claim 5, further comprising:
receiving, from the user, a selection of the second reporting format for the first account;
and
generating a third account statement in the second reporting format for the first account, said first, second and third account statements for printing in the batch printing run.

7. (previously presented) The method of claim 6, further comprising:
receiving, from the user, a selection of a third reporting format from the plurality of reporting formats for the second account; and
generating a third account statement in the third reporting format for the second account, said first, second and third account statements for printing in the batch printing run.
8. (previously presented) The method of claim 7, further comprising:
designating at least one of the first and second account statements for quality review.
9. (previously presented) The method of claim 8, further comprising:
receiving, from the user, a parameter for generating the first and second account statements, the parameter including at least one of: a time period for said account statements, a status of the accounts corresponding to said account statements, a corporate group responsible for the accounts, a number of copies of the account statements to be printed in the batch printing run, and a designation of whether the account statements are to undergo quality review.
10. (previously presented) The method of claim 9, further comprising:
printing the batch printing run after said generating and a completion of a quality review for all designated account statements in the batch printing run.
11. (currently amended) A method for generating account statements for batch printing, comprising:
grouping a plurality of accounts for which account statements are to be generated in a batch printing run;
receiving account data for each of the plurality of accounts, the account data for use in generating an account statement for each of the plurality of accounts;
presenting, to a user, a plurality of reporting formats that are available to be assigned to a subset of the plurality of account statements, each of the plurality of reporting formats defining a printed layout of the account data for the account statements;

receiving, from the user, a selection of an account from the plurality of accounts and a selection of a first reporting format and a second reporting format from the plurality of reporting formats for the account;

receiving, from the user, a designation for corporate review corresponding to at least one of: the first account and the second account, wherein said designation for corporate review is stored with statement parameters;

retrieving the statement parameters applicable to the account statements, wherein the statement parameters include a recipient list, statement description, statement type, statement status, a number of copies to be generated, a the designation for corporate review, and a designation for internal copies; ~~and~~,

assembling a directory of individual account statements, wherein said directory of individual account statements includes the designation for corporate review;

displaying the directory of individual account statements assembled for the batch printing run;

preventing the batch printing run until all individual account statements within the batch printing run are approved and released;

receiving, from a reviewer, a selection of an account statement from the directory for review;

presenting the selected account statement to the reviewer;

receiving, from the reviewer, at least one of: an approval of the selected account statement, a rejection of the selected account statement, a correction of the selected account statement, a request for regeneration of the selected account statement, and a request to delete the selected account statement;

releasing the selected account statement for the batch printing run; and,

generating, in accordance with the statement parameters, a first account statement in the first reporting format and a second account statement in the second reporting formatting for the account, said first and second account statements for printing in the batch printing run.

12. (original) The method of claim 11, said grouping further comprising:
grouping the plurality of accounts based on a group designation selected by the user.

13. (previously presented) The method of claim 11, said first and second account statements comprising at least one of: a billing statement, a credit card statement, and a summary of investment holdings.
14. (original) The method of claim 11, said account data retrieved from a financial database.
15. (original) The method of claim 14, further comprising:
receiving, from the user, a correction of the account data for the first account, wherein the correction is entered into the financial database.
16. (original) The method of claim 11, further comprising:
receiving, from the user, a selection of a second account from the plurality of accounts and a selection of the first reporting format for the second account; and
generating a third account statement in the first reporting format for the second account, said first, second and third account statements for printing in the batch printing run.
17. (previously presented) The method of claim 11, further comprising:
receiving, from the user, a selection of a second account from the plurality of accounts and a selection of a third reporting format from the plurality of reporting formats for the second account; and
generating a third account statement in the third reporting format for the second account, said first, second and third account statements for printing in the batch printing run.
18. (previously presented) The method of claim 11, further comprising:
designating at least one of: the first and second account statements for quality review.
19. (previously presented) The method of claim 11, further comprising:
receiving, from the user, a parameter for generating the first and second account statements, the parameter including at least one of: a time period for said account statements, a status of the accounts corresponding to said account statements, a corporate group responsible for the accounts, a number of copies of the account statements to be printed in the batch printing run, and a designation of whether the account statements are to undergo quality review.

20. (currently amended) The method of claim 11, further comprising:
printing the batch printing run after said generating and a completion of a quality review
for all designated account statements in the batch printing run.
21. (currently amended) A method for generating a batch of account statements, comprising:
grouping a plurality of accounts for which account statements are to be generated in a
batch printing run;
receiving account data for each of the plurality of accounts, the account data for use in
generating at least one account statement for each of the plurality of accounts;
presenting, to a user, a plurality of reporting formats that are available to be assigned to at
least one of the plurality of account statements, each of the plurality of reporting formats
defining a printed layout of the account data for the account statements;
receiving, from the user, a selection of an account from the plurality of accounts and a
selection of a reporting format from the plurality of reporting formats for the account;
receiving, from the user, a designation for quality corporate review for ~~an~~ the account
data ~~account statement generated~~ for the account;
retrieving statement parameters, wherein the statement parameters include a recipient list,
statement description, statement type, statement status, a number of copies to be generated, a the
designation for corporate review, and a designation for internal copies; ~~and,~~
displaying the account data including the designation for corporate review;
preventing generation of the account statement until the account statement is approved
and released;
receiving, from a reviewer, a selection of the account data;
presenting the selected account data to the reviewer;
receiving, from the reviewer, at least one of: an approval of the selected account data, a
rejection of the selected account data, a correction of the selected account data, a request for
regeneration of the selected account data, and a request to delete the selected account data;
releasing the selected account data for constructing the account statement; and,
generating, in accordance with the statement parameters, the account statement for the
account in the reporting format, ~~wherein the batch printing run including the account statement~~
~~can not be completed until the account statement is approved during the quality review.~~

22. (original) The method of claim 21, wherein the account is automatically designated for quality review unless changed by the user.